

What does an AI-augmented operations function look like?

Operations function

Where operations and delivery are heading in the next two to three years, and what GRAIL believes it takes to get there first.

“Judgment stays with the person. The operating picture stays current.”

- 01 Where are you still running this month on last month's facts?
- 02 Which operating rules live only inside your best people?
- 03 Which roles will break when your team stops chasing updates?

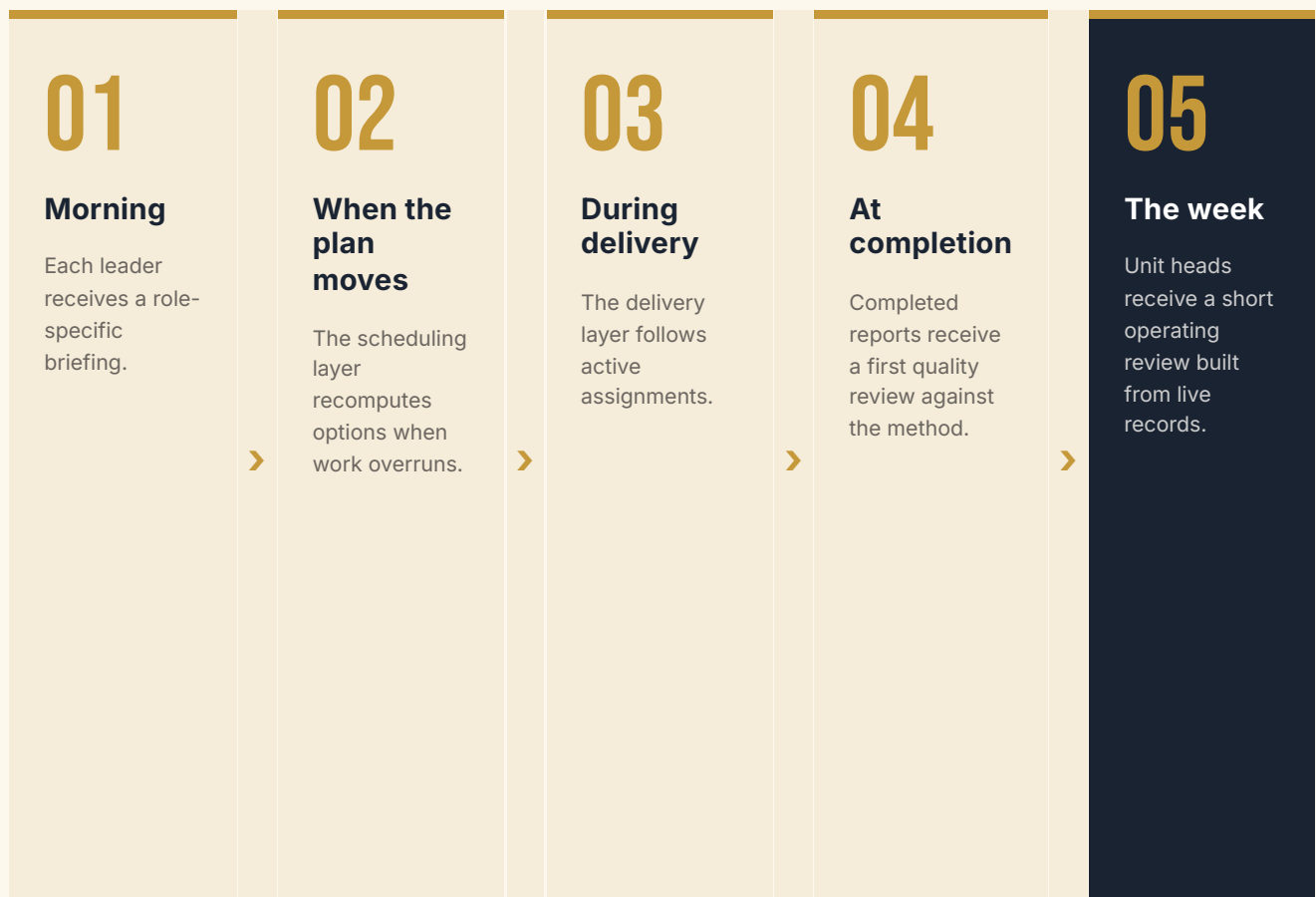


WHAT DOES AN AI-AUGMENTED OPERATIONS FUNCTION LOOK LIKE?

Where operations and delivery are heading in the next two to three years, and what GRAIL believes it takes to get there first.

An operating function spends too much of its day reconstructing what is happening, repairing schedules and chasing records. **The change that matters is that the live picture, the coordination rules and the expert methods become a shared operating layer.** Judgment stays with the person. The operation stays current.

THE OPERATION'S 2028 DAY



Judgment stays with the person. The operating picture stays current.

GRAIL's view of the operating function ahead. A position, not a survey.

The schedule may be current. The explanation is *not*.

Operations and delivery convert a commercial promise into completed work and cash. The accountable leader may be a COO, operations director, Head of Operational Excellence, country lead or business-area head. Around that leader sit resource managers, schedulers, programme managers, project controllers, quality specialists, supplier managers and site or regional managers.

The function drives growth through available capacity, reliable delivery and customer retention. It shapes contribution margin through utilisation, rework, subcontractor spend and the ability to turn completed work into an accepted deliverable. Unit heads often carry a local P&L beside the operating scorecard.

Eight processes

01	Capacity and resource planning	05	Supplier and subcontractor management
02	Scheduling and dispatch	06	Site or unit follow-up
03	Project and assignment delivery	07	Continuous improvement
04	Quality control of delivered work	08	Incident handling and delivery reporting

The scorecard spans utilisation, billable share, gross margin, on-time delivery, schedule adherence, throughput, cycle time, backlog, rework, complaints, SLA attainment, incident frequency and forecast accuracy. The measures exist. The explanations arrive late.

Information sits across the ERP, field-service or project system, CRM, workforce system, quality records, Teams or email, customer portals and spreadsheets. The schedule can be current while skills data is stale. Finance sees invoiced delivery after the fact. The operational explanation remains in conversations and in the heads of experienced coordinators.

The function is rich in operating data and poor in shared operating context.

Units submit updates, central staff reconcile definitions, and management discusses what happened last month. Attention goes to the largest business area or the site with the loudest manager. Intervention starts after the assignment, schedule or customer promise has already moved.

Control becomes *continuous.*

The function changes through two foundational shifts.

Management cadence moves from collecting reports to managing exceptions continuously. The operating record directs attention toward assignments, units and suppliers departing from plan. A deteriorating assignment becomes visible before its margin is gone. An implausible utilisation forecast is challenged before month-end. Small units receive the analytical depth previously reserved for the largest business area.

Monthly reporting remains useful for governance. It stops being the primary control mechanism. Operating meetings begin with what changed, what evidence supports it and which intervention now requires a decision.

Coordination and expert judgment become shared infrastructure. Scheduling rules, accepted quality examples, prior decisions and escalation thresholds enter the workflow. The best scheduler's constraints no longer live only in experience. The quality specialist's method no longer reaches only the work they have time to inspect.

Schedulers and coordinators remain essential, but the centre of their work moves. They manage exceptions, customer commitments, optimisation rules, supplier choices and cross-unit improvement. Their judgment reaches further because retrieval, comparison, documentation and monitoring happen around them.

Better coordination releases productive time around physical and professional work. It does not remove the technician visit, the regulated inspection or the difficult customer conversation.

WHERE IT IS WEAKEST novel trade-offs, customer commitments, safety decisions, regulated conclusions and work that depends on physical skill. These remain with qualified people, and should.

A day, a week, a *month*.

A function that invests heavily still employs operators, coordinators, specialists and managers in 2028. Its shape changes. Less capacity sits in report collection, schedule manipulation and status chasing. More sits in exception management, customer recovery, data stewardship, workflow ownership and operational improvement.

The day

MORNING

Each leader receives a role-specific briefing rather than beginning with a dashboard hunt. A field-service lead sees uncovered work orders, likely SLA breaches, late technicians, missing parts and proposed schedule changes. A professional-services head sees assignments likely to overrun, utilisation gaps, deliverables awaiting review and requested scope that no longer matches the plan. A multi-site leader sees only the units requiring attention, with the evidence behind each alert.

WHEN THE PLAN MOVES

The scheduling layer recomputes options when work overruns, a customer cancels or a person becomes unavailable. It checks skills, territory, working hours, travel, parts and protected bookings. Routine changes inside agreed rules can proceed. Overtime, subcontractor calls, protected commitments and customer-sensitive moves go to a dispatcher for approval.

DURING AND AT COMPLETION

The delivery layer follows active assignments. It reconciles time, milestones, dependencies, customer correspondence and commercial scope. It prepares the next action and flags progress that conflicts with booked effort. Completed reports, certificates, analyses and work-order notes receive a first quality review against the method, contract, template and accepted examples. A named professional owns regulated conclusions, material advice and final approval.

THE WEEK Unit heads receive a short operating review built from live records. It separates a data-quality problem from a delivery problem and shows what changed since the previous review. The meeting is spent choosing interventions, not arguing about whose spreadsheet is current.

THE MONTH Finance and operations close the delivery picture together. Completed work, unbilled effort, milestone acceptance, subcontractor commitments and invoice readiness are reconciled before the management meeting. The formal report comes from the same operating record used throughout the month.

Continuous attention to every material assignment. A consistent first review of delivered work. Equal diagnostic depth for every unit. Capabilities once unaffordable at mid-market scale become the operating standard.

What runs, and what stays with the *person*.

PROCESS	WHAT THE AGENT DOES	WHAT STAYS WITH THE PERSON
Capacity and resource planning	Builds scenarios from backlog, role profiles and planning rules; with live access, maintains demand and capacity views by skill, site and week	Hiring, subcontracting and priority trade-offs
Scheduling and dispatch	Proposes the best qualified resource within travel, SLA, skills and working-time constraints; replans as conditions change	Exceptions, customer-sensitive moves, overtime and protected commitments
Project and assignment delivery	Maintains the assignment record, drafts updates, checks dependencies and flags scope, effort or margin drift	Interpretation, customer commitments and corrective action
Quality control of delivered work	Checks each deliverable against the method, contract, template and accepted examples; identifies omissions and unsupported claims	Regulated conclusions, material advice and final sign-off
Supplier and subcontractor management	Prepares work packages, checks qualifications, tracks responses and issues approved routine orders or reminders	Supplier choice, negotiation, exceptions and relationships
Site or unit follow-up	Produces a daily exception brief, compares relevant peers and records approved follow-up	Validating causes and deciding interventions
Continuous improvement	Mines delays, rework and incidents, groups recurring causes and drafts controlled experiments	Choosing the hypothesis, setting limits and verifying results
Incident handling and delivery reporting	Structures the report, retrieves similar cases, checks required actions and drafts internal or customer updates	Severity, safety decisions, root-cause judgment and external communication

Give the right-hand column particular attention. It contains the decisions that carry operational, customer or professional consequence. The left-hand work exists to bring those decisions forward sooner and support them with evidence.

Four stages, and the *operations-system position* today.

A realistic path has four stages. They map directly onto the rungs in The Access Ladder, and the order matters.

- 01 Documents only**
Exported schedules, SOPs, contracts, example deliverables and prior reports support planning scenarios, first quality reviews and drafted updates. Operators supply current context by hand. There is no live-system access and every output remains a draft.
- 02 Read access**
Connect first to the system where delivery work is represented: the field-service platform, project tool, scheduling system or ERP production module. Add the ERP and CRM for financial and commercial truth. Workforce, quality, supplier and telemetry data follow. The result is one current view of work, resources and commitments.
- 03 Read and act with approval**
The operating layer proposes schedule changes, task updates, acceptance requests, supplier orders and delivery-record changes. Responsible people see the source evidence and approve governed calls into the system. The record changes only after the decision owner has accepted the action.
- 04 Bounded autonomous action**
Low-risk schedule moves, routine reminders, task creation and routing can run within agreed rules. Customer commitments, overtime, safety decisions, supplier awards and financial postings retain named approval. The boundary is set by consequence, not technical possibility.

The operations-system position, as of September 2026

Microsoft Dynamics 365 Business Central	Production REST APIs support standard and custom business objects. The native server preview covers administration-centre operations, not general operational transactions. Delivery agents still use APIs or governed custom actions.
SAP Business One	The production Service Layer exposes business objects through HTTP and OData v4. The official open-source server sample is an implementation starting point, not a managed connector.
IFS Cloud	Business entities and logic are available through OData REST endpoints and published specifications. No vendor-hosted endpoint was identified. A governed wrapper can expose selected operations.
Monitor ERP	Query and read access are available. Write commands require the paid API and run through a permissioned user. No vendor-hosted endpoint was identified.
Visma Net and Spirix	Visma Net provides an OAuth-controlled ERP API. The hosted Spirix server can read and act on customers, orders, invoices, suppliers, projects and accounting records, while keeping responsibility with the user.
Project and collaboration systems	Atlassian and Asana support governed reads and writes. HubSpot supports permission-aware CRM reads and selected writes. Microsoft Graph uses delegated, user-interactive permissions. Google Workspace remains in developer preview.

Point connections are sufficient for one workflow. Cross-unit analysis across systems and years needs event-level history and shared definitions in a warehouse or lake.

The field-service, ERP or project system keeps permissions, transaction rules and the audit record. Each action records the initiating identity, source evidence, proposed change, approval, executed call and resulting system state. People stop opening several interfaces to assemble an answer. They receive the briefing, inspect the evidence and decide.

Six things we believe about the continuous *operation*.

Operations is often treated as a tooling problem. It is a management design problem. Six beliefs determine whether the operating layer becomes part of the work or merely another interface around it.

01 The monthly report is too late to run the operation.

Governance can stay monthly. Control cannot. A live record must direct attention to the assignment, unit or supplier leaving plan while intervention still matters.

02 The floor is faster coordination. The ceiling is equal attention.

Saving time on status collection is useful, but it is not the main prize. The deeper shift is giving every unit, assignment and deliverable the analytical attention once reserved for the largest problem.

03 Coordination rules are company infrastructure.

The best scheduler's constraints, the quality specialist's accepted examples and the delivery manager's escalation thresholds should not remain private craft. Put them into the flow, keep named owners accountable and update them when operating reality proves them wrong.

04 The record must move with the work.

No operating layer can warn early from stale schedules, late time records or disputed definitions. Updates should be proposed from actual work, approved where consequence demands it and written back so the next decision begins from the same truth.

05 Augment the judgment and protect the physical work.

Travel, equipment, human dexterity, customer conversations, regulated conclusions and safety calls remain real constraints. The operating layer prepares, checks, reconciles and monitors. Qualified people decide what consequence the evidence should carry.

06 Role redesign begins before capacity appears.

Schedulers need to become exception managers. Coordinators need customer and control ownership. Quality specialists need responsibility for evaluation rules, difficult failures and accepted examples. If the old review work stays on top of the new flow, the operation gains another queue instead of a new way of working.

These six beliefs concern how work is delivered and controlled, rather than taking a position on technology. Every tool inherits the cadence, definitions and decision boundaries the leadership team chooses.

Roles, rhythm, and where it *fails*.

Schedulers move from manipulating the plan toward managing exceptions and owning optimisation rules. Project coordinators move toward delivery control, customer follow-up and data stewardship. Quality specialists design evaluation rules, investigate difficult failures and maintain accepted examples. Site managers spend less time explaining results and more time correcting them.

The team needs process decomposition, data literacy, evaluation design, escalation judgment and a working understanding of system permissions. Senior operators must make tacit rules explicit. Junior employees need earlier exposure to difficult judgment cases because routine coordination provides less of their traditional apprenticeship.

The rhythm

FIRST

A document-grounded agent changes one coordination-intensive flow

NEXT

A read-connected workflow establishes accuracy and escalation rules

THEN

Several units work from the same operating record

AT SCALE

Roles, customer coverage, decision rights and the improvement cadence are redesigned

The sequence reflects connection scope, data cleanup, process ownership, evaluation and adoption. One main operational system and a named process owner make the path tractable. The operating rhythm changes only when the new flow replaces old work.

WHERE IT FAILS Unreliable skills, duration or availability data. Every alert marked urgent. Definitions imposed centrally and disputed locally. Drafted updates resting on stale delivery records. Coordinators moved before exception ownership and customer coverage are redesigned. Generic language checks posing as quality review. Local workarounds continuing outside the governed flow.

Involve the people whose work changes while the rules are still being made. The operating layer becomes shared infrastructure only when operators trust its record, its boundaries and its path for escalation.

Twelve questions for the operations *leader*.

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- 1 Every site could receive a daily explanation of what is moving off plan, giving small units the attention previously reserved for the largest. Which units would improve fastest if central operations saw their problems every morning?
 - 2 Every active assignment could be checked for scope, effort and deadline drift before the margin is lost. How much earlier could your project managers intervene?
 - 3 Every completed report or deliverable could receive an agent-assisted first quality review before it reaches the customer. Where does quality vary most depending on who performed the work?
 - 4 A dispatcher could receive a ready-to-approve replacement schedule whenever work overruns or someone cancels, while overtime, safety and customer commitments still require approval. Where would you draw that approval line?
 - 5 Available employees and subcontractors could be matched against demand by skill, location and customer promise. Which work do you delay today because nobody can see all available capacity?
 - 6 Completed work could become invoice-ready as soon as the required evidence and customer acceptance are present. How many days of working capital sit between delivery and billing?
 - 7 Supplier qualifications, availability and past performance could be checked before each assignment. Where are coordinators repeatedly chasing information that already exists?
 - 8 Each site manager could receive a briefing that separates a real operating problem from a missing or incorrect data point. How much meeting time goes into arguing about the numbers?
 - 9 Incident reports could arrive already structured, linked to similar cases and ready for an owner's decision. Which incidents currently consume expert time before the real investigation starts?
 - 10 The reasoning of your best scheduler, inspector or delivery manager could be captured and made available to every colleague. Which departure would remove the most operational knowledge?
 - 11 Customer updates could be drafted from the live delivery record and checked against the agreed scope. Where do customers currently hear about a delay too late?
 - 12 Recurring delays and rework could be grouped into improvement opportunities every week instead of waiting for a formal initiative. Which process problem has survived because nobody has time to assemble the evidence?
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These are the questions the programme is built to answer with the people who run the operation, on their own assignments, units and delivery records, rather than from the outside.